

# Analysing LAIF 2008 as a competitive market turf

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The dust is settling and all the Champagne corks have popped to validate the culmination of activities for LAIF (Lagos Advertising and Ideas Festival) 2008. The winners, the losers and the organisers have all reflected on how best to make it better. The 2008 edition leaves us much to build upon in our quest for continuous improvement as an emerging creative market.

I was at the event as an observer to celebrate the final output of some of my strategic inputs. I just hope that sooner or later Effie awards will be instituted in Nigeria to celebrate the cerebral logic behind the creative sparks we see. It will be a platform for the unseen hands of the strategy planners, brand analysts, market intelligence, media planners, and research analysts etc. to be acknowledged in the creative delivery process.

I have therefore taken the liberty to analyse the event as a simulated marketing turf where advertising agencies compete for share of influence in the business that follows the logic of Adam's closed loop. I am sure beyond the obvious pitches; you will all agree with me that our world is a very demanding marketplace in a struggle for share of billings and accounts.

## The challenger brands

Challenger brands are traditional runner-up or trailing firms like the popular Colgate, Ford, Avis, and PepsiCo who continuously aspire to take on and eventually dislodge an established market leader in their category. At LAIF 2008, they are defined as those winning their first Grand Prix and therefore occupying the first four positions on the medal table. They are first-timers in the hall-of-fame of LAIF's prestigious winners. STB McCann, ZK, LTC-JWT, and SO&U Saatchi emerged as strong future contenders to watch out for in the future.

However, this year's challenger brands could not demonstrate sufficient creative fire-power to instantiate competitive disequilibrium. They were largely flanking with no serious frontal attack as none of them made a double Grand Prix like 2006 and 2007 winners. I feel their creative attack was not convincing enough to match the historical benchmark of two Grand Prix and minimum of eight awards cumulative total to occupy the exalted position. In total, none of them received as much spread of awards as DDB's 14, Insight Grey's 11, TBWA's 10, or BatesCosse's 10. From relative performance indices, there was no winner at LAIF 2008 because an occasional spark without a consistent track-record cannot translate to sustainable advantage.

You will recall that each of Prima Garnet Ogilvy and Leo Burnett Rosabel's double Grand Prix in 2006 was completed with 12 and eight awards respectively while Insight Grey's 2007 double Grand Prix came with 13 medals. DDB's 2007 Grand Prix for MTN Loaded music came with eight awards!

Historically, only STB McCann has the highest performance track record in LAIF. 2006 came with eight medals including two gold in 2006 and a total of nine awards including three gold that made it fourth at the 2007 edition.

ZK is new kid on the block trying hard to be the Usain Bolt of the Nigerian advertising industry with three gold and a Grand Prix for Celtel brand. It's noteworthy that ZK is the best new entrant this year.

LTC-JWT's does not have a "golden" path at LAIF. Its Zip-Up campaign was its only award in 2007.

SO& U Saatchi obviously wanted to use the 2008 edition to stage a come-back, but the several credibility queries on the original owners of the popular Guinness' Udem commercial that won them a TV Grand Prix has become an issue that AAAN must address. All popular creative halls of fame maintain that Saatchi and Saatchi London created the job with valid claims on individuals that made the team. However, the agency needs to convince the market that it can address its fall from six awards in 2006 to four awards in 2007.

For all the players, we must recognise the potential capability of challenger brands to dethrone enthroned champions. Toyota today produces more cars than General Motors, and British Airways flies more international passengers than the former leader, Pan Am, did in its heydays.

## **Where are the market leaders?**

Market leaders are category champions who have secured significantly higher share of market to hold the ace. They are Microsoft (computer software), Intel (microprocessors), Caterpillar (earth-moving equipment), Coca-Cola (carbonated soft drinks), McDonald's (fast food), and Gillette (razor blades/men's grooming).

Using previous performances at LAIF, I will define the market leader as any player that has won at least a Grand Prix in previous editions. There are only four - Prima Garnet Ogilvy, Rosabel Leo Burnett, Insight Grey and DDB.

At LAIF 2008, most of the leaders lost on position defence, because some of them won the highest numbers of awards but lost out on the all-important Grand Prix gong award. DDB was the most awarded agency with 14 medals followed by Insight Grey's 11 awards but both had no Grand Prix, though DDB received a nomination for a Grand Prix radio for its work on Fidelity Bank's Sweetea. The other two leaders - Prima Garnet Ogilvy and Rosabel Leo Burnett recorded no single Gold at LAIF 2008!

Another strong leader to note is TBWA at LAIF 2008, making a come-back as a formidable force replicating the BMA days to occupy the sixth position on the medal table with 10 awards after Insight Grey (fifth position). On year-on-year growth, DDB though seventh on the medal table, recorded the highest consistency with an average of 10 awards per year, making it the most consistently creative agency and also the most awarded ever.

However, like every market leader, the five agencies mentioned above have a huge responsibility to find ways to expand total market demand by securing new users, new uses, and more usage of advertising outputs. A market leader will only survive if it increases the opportunity that is available to the market. Market leaders must also defend its territory by continuous market broadening.

A product innovation like Nokia's and Ericsson's digital cell phones secured leadership over Motorola's analog models, as Sears did when it underestimated Kmart and Wal-Mart.

Tzu, the famed Chinese military strategist in a treatise called "The Art of War," told his warriors "One does not rely on the enemy not attacking, but on the fact that he himself is unassailable." The most constructive response is continuous innovation and that is the challenge for the current market leader.

## **The market followers**

The market followers remains the old but trusted hands like FCB Centrespread, Lowe Lintas, Eminent, Explicit etc, who will not rock the boat for great awards but are very contented with at least an award to reinforce that participation is more than winning. They have credentials that appeal to their defined market and they hold tightly to their traditional accounts.

However, some of them seem to be slipping from their previous performance. Lowe Lintas came down to one gold from its brilliant nine medals (including two gold) in 2007, of which four were won on V-mobile. FCB Centrespread's best performance in LAIF is its one Gold for its very exciting Skye Bank 'Yes' radio.

## **...and finally the niche players**

The niche players have identified a distinct gap that they can focus their strengths to service in the market. The key idea in niche playing is specialisation, which often comes out of serendipity than a focused intention. Their mantra is rather than be a follower, I will be a leader in a small market.

At LAIF 2008, BateCosse was disVIRGINed nine times, winning 90% of its total award from Virgin Nigeria alone, making it the most awarded brand, a little ahead of MTN's seven. It seems the Bates' creative team have learnt how to always "touch the right spots." With two gold to place eighth on the medal table, Bates doubled up from its five awards in 2007 to 10 awards in 2008. Wonder boy 141 worldwide, a fully specialised niche set up to service BAT, yet through-the-line agency went down from one gold for MTS in 2007 to not a single award at this year's edition.

Niche playing also offers an entry point for some of the new agencies that will shake the landscape next year - Lanre Adisa's Noah Ark, Tunji Olugbodi's Verdant Zeal and Charles Arong's Alternativ. Their entry strategy will normally be to avoid competing with larger firms by targeting small markets of little or no interest to the larger firms. This is how the Jupiter Drawing Room became Africa's best indigenous agency with no affiliation.

However, I see possible evolution of vertical-level niche specialists serving a specific category. Comex for example is an automobile advertising firm based on the few things I have seen, like Bluebird before Yinka Daramola was perceived as an insurance-sector agency. Eagle Eye Communications is largely servicing the Dana conglomerate.

We already have seen significant customer-size niche specialists, who are our traditional "portfolio boys" running hotshops to service small customers who are neglected by the major players. I see a potential future where some of the big players will buy into them and position them as fighter brands against the unstructured portfolio boys who are "cleaning" up accounts from their one-bedroom apartment at lowest cost to the client, with added advantage of "next day delivery."

Regional niche players are also emerging from Abuja (FCT). Job-shop specialists already exist as in-house agencies like Globacom, UBA etc. This firm customises their products for the individual customer. I think AAAN should allow them to participate in LAIF 2009 in order to fully capture the best of creativity in our industry.

The Nigerian advertising terrain is truly on the ascendancy, and a conscious preservation of the credibility of LAIF remains one of the critical success factors.

All players must always live by Kotler's counsel: "Don't buy market share. Figure out how to earn it."

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